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ABSTRACT

These teacher's materials are intended to support trainers as they conduct a 1-day course on each of the following topics regarding the hotel and catering industry in Great Britain: the customer perspective, customer service standards, and quality control. The first section explains how to use the materials. The instructions for conducting each course include trainee objectives and directions for conducting multiple sessions within each course. The sessions involve discussions, brainstorming, and pencil and paper activities. Among the topics covered in the course on customer perspective are: Who is the customer? What do customers expect at each stage of the service journey? What do customers find important? Who is responsible for giving customers what they want? What should be done to find out what customers want? and What is most important to particular groups of customers? The topics in the course on customer service standards are: How can conflicts of interest be resolved and how can constraints that prevent staff from satisfying customers be lifted? What service standards are needed to satisfy the key expectations of customers? and What must be done to ensure that customer standards are reached? Among the topics in the quality control course are: How can success at meeting customers' expectations be measured? Is the support from senior management sufficient? and How can momentum be maintained? The document concludes with a summary of session topics. (CML)

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OPERATIONAL
MANAGEMENT
PROGRAMME

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Customer Care Management

MODULE

CUSTOMER CARE MANAGEMENT

OPERATIONAL MANAGEMENT PROGRAMME

ACKNOWLEDGEMENTS

Customer Care Management draws heavily on the HCTC Action Pack and video *A Question of Service*, written, piloted and developed by Claire Nash. It also draws on and supercedes the HCTB Open Tech unit *Managing Standards of Service*, written by Michael Nightingale and John Coss. *Customer Care Management* was developed by Peter Critten, written by Jennifer Murray and Roy Hayter, and the cartoons are by Ian West.

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CUSTOMER CARE MANAGEMENT

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HOW TO USE THIS UNIT

The material in *Customer Care Management* directly supports the HCTC series of customer care courses. Each section corresponds to the one-day course of the same title:

- The customer perspective
- Customer service standards
- Quality control.

The material will help you prepare for and run around 17 discussion sessions for a group of your staff and thus complete the 12 *Customer Care Management* assignments in your *Operational Management Planner*. These assignment cards become a personal record of your achievement, and successful completion leads to an award of an HCTC certificate. They are also intended to form the basis of an on-going process of reviewing whether your organisation and staff are succeeding in giving the customers what they want.

The format of *Customer Care Management* is similar to the other self-study units in the Operational Management programme, and each of the three sections within it follows a similar pattern. You will be:

- reminded of some of the key issues covered on the course
- asked to read various extracts reproduced from *A Question of Service*
- given the opportunity to make some notes of your own
- given directions for running each session.

From time to time you will be asked to relate information given in the text to your own experience and knowledge, and space is provided below these activities for you to write your answers. Where appropriate, suggested solutions are given to activities — on the following page so that you are not prompted unnecessarily or prevented from coming up with better ideas! In many cases these activities are intended to help you prepare for a particular discussion session with your staff. From time to time you will come across a printed form on which you can summarise the outcome of each session. You are also invited to record your own experiences and thoughts after running each session. For example, you may wish to note the staff's response to different approaches you took, especially if you are relatively inexperienced at running sessions of this kind. In this way you can discover the most effective methods, and discard what does not work so well. You may also wish to remind yourself in the space provided after each topic of any actions you will need to take.

In order to run these sessions with your staff you do not need to have special training expertise — just basic experience in encouraging and helping:

- adults to learn and develop
- staff to work as a group.

Both you and the organisation's decision-makers should be aware that a considerable commitment is required, if the project is to be successful. The activities involved will eventually affect everyone who works in the organisation, and you should be prepared to tackle barriers people may put up. You may also experience reluctance within the pilot staff group itself, and ways of overcoming this need to be found. It is preferable to work towards gaining the support of all staff — and a firm commitment from senior management before you start. It may sound daunting, but if the organisational atmosphere is right the project should soon develop its own momentum as staff become more knowledgeable and start to take responsibility for satisfying the customer.

It is suggested that the staff group should consist of no more than ten members. The ideal number is between six and eight. If possible members should be chosen from a wide range of different jobs, seniority and length of service to give a variety of points of view. Staff from behind the scenes who do not have direct communication with the customers are just as important as those who do. An ideal group might consist of:

- waiter or waitress
- barstaff
- maintenance engineer
- head chef
- restaurant manager
- receptionist
- secretary
- head housekeeper
- housekeeping staff.

Each session with your staff group should ideally last between 45 minutes and one hour. Choose a time and place to meet which is as convenient and quiet as possible. As you will have to draw diagrams and list suggestions from your group, you will find it useful to use coloured pens and a flip chart or board with a supply of suitable paper.

At your first session explain to your staff that over the next three months or so you will be working together to get a better understanding of your customers' needs in general and of one group of customers in particular. The overall aim is to meet customers' needs more effectively, so contributing to the overall success of your establishment. The exercise can be repeated for each of your main customer groups. Customer care management is an on-going activity.

Never be satisfied that your customers are satisfied!

SECTION 1
The customer perspective

After completing this section you and your staff will be able to:

- find out in general who your customers are and build up a picture of what happens to a selected group of customers when they visit your establishment
- explore the expectations of your customers and understand the dangers of making assumptions about what customers expect
- consider the services and facilities your customers expect, their relative importance, what goes into providing these services and which staff are involved
- build up knowledge of what your customers really want (as opposed to what you think they want) by asking, observing and listening, and using appropriate establishment records and systems.

It will help you prepare for and run discussion sessions 1 to 8 with your staff and from the results of these complete the six assignments on *The customer perspective* in your *Operational Management Planner*.

1. WHO ARE YOUR CUSTOMERS

Every customer wants something slightly different, and this can be a problem for the establishment and staff. However organisations can usefully group customers into similar types and so provide services and facilities which are generally appropriate. How this can be done is explained in *A Question of Service*.

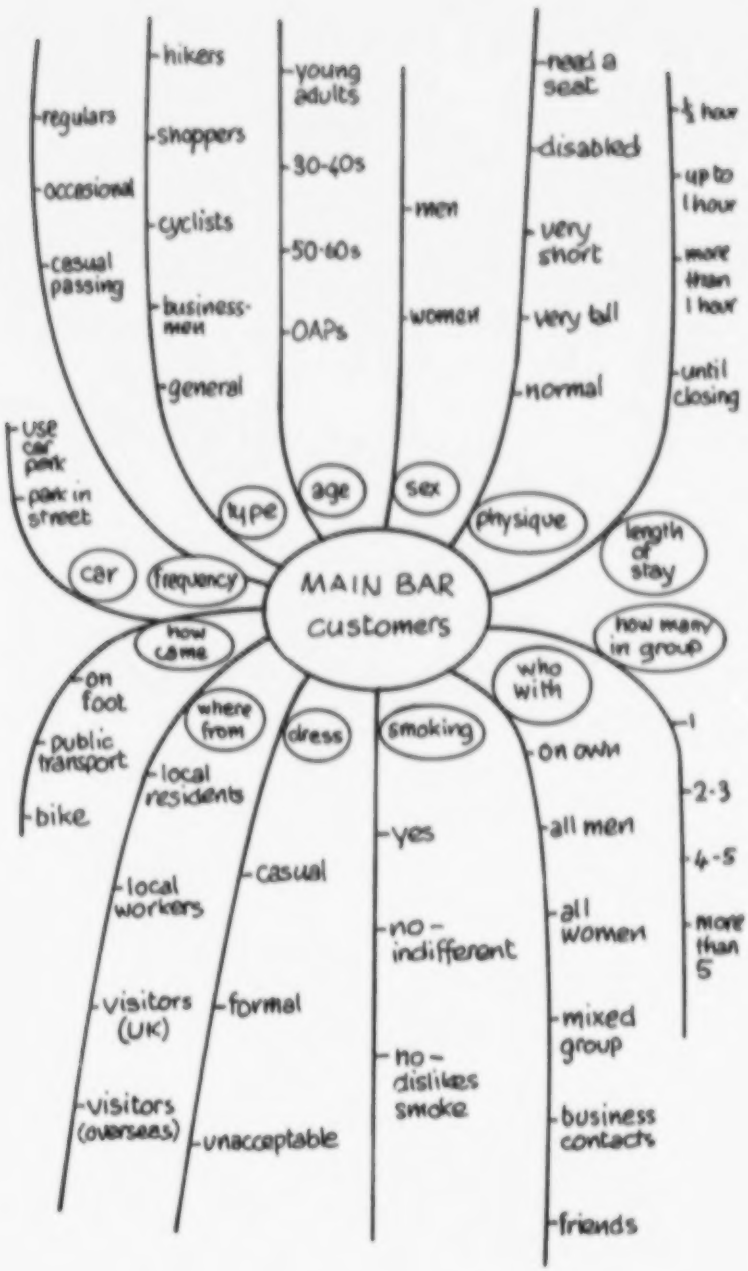
This kind of grouping is often called market segmentation. It usually involves identifying customers and potential customers by:

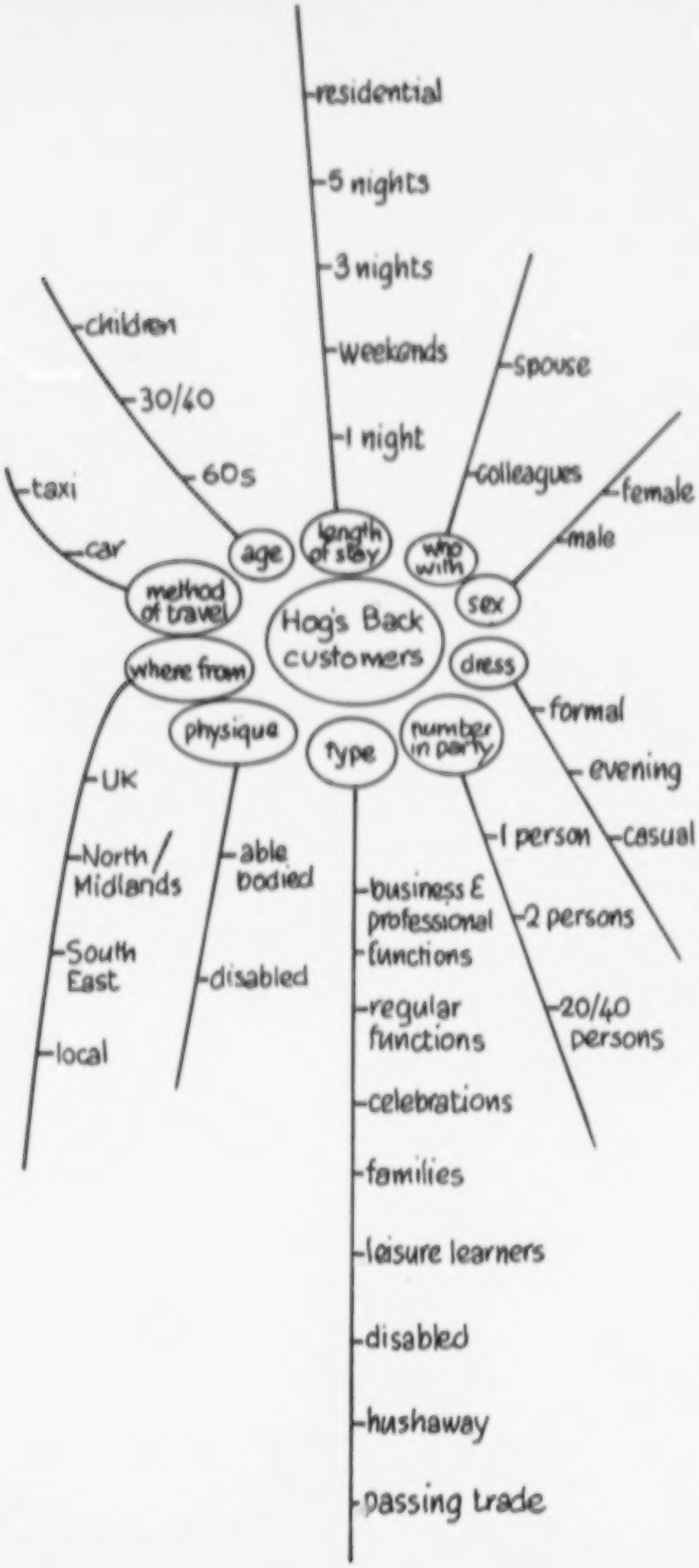
- age
- sex
- job
- education
- earning power
- type of residential area where home is
- house ownership.

These market segments have proved useful over the years, especially for marketing activities. Your group may find the following categories even more useful in helping decide who customers are:

- purpose of the visit — for example drink, eat, play golf, business meeting, family outing, get fit, socialise
- kinds of benefits that people are seeking — for example 'to be seen', to make life easy, to avoid cooking
- behaviour — for example quiet, noisy, sociable, solitary
- use of facilities/services — for example main bar, lounge, restaurant, pool, sauna, sun-beds.

A useful way of organising responses to the question 'Who are our customers?' is to arrange them as a spidergram. The unit or establishment becomes the body of the spider, and as different types of customers or market segments (age, length of stay, and so on) are thought of, legs can be added as necessary. Categories within each can be seen as the hairs on the spider's legs! For 'age' these may be OAPs, 50-60s, 30-40s, and for 'length of stay' they might be one night, weekends and residential. The example opposite (adapted from *Managing Standards of Service*) shows the customers for a pub's main bar. The second example (overleaf) is the first spidergram brainstormed by staff at the Hog's Back hotel (from *A Question of Service*).


MAIN BAR customers
type
regulars
occasional
casual passing
hikers
shoppers
cyclists
business-men
general
age
young adults
30-40s
50-60s
OAPs
sex
men
women
physique
need a seat
disabled
very short
very tall
normal
length of stay
½ hour
up to 1 hour
more than 1 hour
until closing
how many in group
1
2-3
4-5
more than 5
who with
on own
all men
all women
mixed group
business contacts
friends
smoking
yes
no - indifferent
no - dislikes smoke
dress
casual
formal
unacceptable
where from
local residents
local workers
visitors (UK)
visitors (overseas)
how came
on foot
public transport
bike
car
use car park
park in street
frequency


Hog's Back customers
length of stay
residential
5 nights
3 nights
weekends
1 night
age
children
30/40
60s
who with
spouse
colleagues
sex
female
male
method of travel
taxi
car
where from
UK
North / Midlands
South East
local
physique
able bodied
disabled
type
business & professional functions
regular functions
celebrations
families
leisure learners
disabled
hushaway
passing trade
number in party
1 person
2 persons
20/40 persons
dress
formal
evening
casual

12

Consider the preparations you need to make for the first session with your group of staff, and make notes below under the appropriate headings.

Who should be part of the group?

When will you meet and where? Do you need to book the space or inform anyone, for instance senior and department managers, beforehand? Will extra chairs be needed? Should any special arrangements be made to reduce interruptions?

Are there any special points you can make which will explain more clearly the aim of the discussion (to find out who your customers are), and encourage fuller participation? Do you anticipate that any staff will need special help, for example in overcoming their shyness or realising that their views are as valuable as anyone else's?

What equipment will you need to organise, such as a flip chart, chart stand and paper (or the equivalent), rough paper, coloured pens, and a supply of paper and ordinary pens for members of the group?

Session 1: Who are our customers?

The aim of this session is to:

- group your customers into similar types, with the aid of a spidergram, on the basis of where they come from, how they travelled, their sex and age, how often they visit the establishment, how long they stay, whom they are with, and so on
- select from the spidergram a group of customers which you and your staff will use as your example in working through the *Customer Care Management* module.

The selected customer group should preferably have:

- roughly similar needs
- be reasonably significant to the business.

The spidergram will help you and your staff to choose, but at this stage you should not be tempted to define the customer group too exactly, unless of course you believe the grouping makes a substantial contribution to the business. For example, if you had developed a spidergram similar to the main bar example on page 7, a mixed sex group of old age pensioners would be a more useful grouping than a mixed sex group of old age pensioners who are dressed formally and dislike smoke.

You may find it useful to draw up a practice spidergram below. But if you do so, be aware of the danger of inhibiting your staff from coming up with different suggestions during the session. (The point of brainstorming is to encourage a free flow of suggestions from the staff, and you will not achieve this if they fear they may give a 'wrong' answer.)

- *Draw up a circle in the middle of the page, and give it an appropriate title.*
- *Build up the different legs to indicate the various types of customers or market segments.*
- *Add the hairs to the legs to indicate the various categories within each customer type.*

NOW RUN SESSION 1.

At the end of the session keep the flip chart sheet with the spidergram so that you can copy it on to Assignment 1 of The customer perspective.

Make a note below of the customer group you and your staff have selected. A note of your selected customer group should also be made in Assignment 1 of The customer perspective.

If you plan to repeat the process with other groups of customers you might like to list these below as a reminder. (This is one way of including other significant groupings which your staff suggested during the session.) On the other hand you may prefer to select subsequent customer groups later, once your staff have had the experience of dealing with the first selected group.

The space below is for you to record any thoughts you may have on how you think your first session went.

2. WHAT YOUR CUSTOMERS DO WHEN THEY VISIT YOUR ESTABLISHMENT

One of the first and simplest steps to finding out what customers want is to consider what they **do** during the service journey. This will not, of course, tell you exactly what they are thinking, but the process will form a reasonably accurate basis for a deeper insight into your customers' needs — *because what people **do** is the visible giveaway of what they are **thinking** and **feeling**.*

A visit to any hotel, catering, leisure and tourism establishment, be it a pub, museum, hospital or leisure centre, can be seen as a kind of journey, rather like taking a train, aeroplane or bus. Whether people are making a visit or a journey they follow a similar pattern:

- preparing
- joining
- participating
- leaving
- reflecting.

In *A Question of Service* this is described as a *service journey*, made up of three distinct time phases — before, during and after the visit;

PREPARING JOINING PARTICIPATING LEAVING REFLECTING

BEFORE ◄► DURING ◄► AFTER

The service journey is a simple and practical way to look at the complex experiences of your customers. It works by imagining that every time someone becomes one of your customers, he or she goes on a kind of journey — a service journey.

Customers need not be aware of all aspects of this service journey. They are unlikely to be familiar with the term. It is really an idea to help staff see things from a customer point of view.

During the five stages of the service journey the customer might be expected to do different things, such as:

PREPARING

- considering whether to join
- making initial enquiries
- travelling.

Some staff may find the idea strange that the customer's preparation for a visit is something the staff have control over (this is discussed in later sessions).

JOINING

- deciding to enter the establishment
- meeting reception staff
- paying membership fee.

In some organisations this stage may go almost unnoticed. For instance a couple who park easily in a pub car park, go into the main bar and greet the barstaff, will probably not be considered *joining* as such. In other establishments such as clubs or other places where the customer pays before *participating*, the joining process is more marked.

PARTICIPATING

- enjoying a swim
- having a drink
- talking with friends.

This is a crucial element of establishments in hotels, catering, leisure and tourism. Your customers participate in your service as guests, visitors, clients, punters, members or whatever term you use. In contrast, the customer goes away while the service is provided in organisations such as laundries, auto service garages and washing machine repairers.

LEAVING

- paying the bill
- getting out
- travelling.

This stage is similar to joining, and is often overlooked. It is the stage at which customers will have formed their overall impression of the visit.

REFLECTING

- discussing
- forgetting
- revising impressions.

This stage cements what the customers think about your services, determining whether or not they will return, and what they will tell their friends.

*List under the appropriate heading below what a customer might **do** during each of the five stages of the service journey — before, during and after a visit to a pub. Some examples are given to start you off.*

PREPARING

Decide what to do: to go to a pub.

JOINING

Park the car in the pub car park.

PARTICIPATING

Order a drink.

LEAVING

Say goodbye to friends.

REFLECTING

Tell a friend what a nice atmosphere the pub has.

How do your suggestions compare with those in *A Question of Service* adapted below?

PREPARING

Decide what to do — to go to a pub.
Choose a pub.
Ring friend to arrange to meet there.
Decide to meet at another 'more convenient' pub.
Drive towards pub.
Find exact location.

JOINING

Park the car in the pub car park.
Walk into pub.
Check that it seems all right before going in.
Enter pub.
Decide which bar to go to.
Return barstaff's 'hello'.

PARTICIPATING

Look for your friends and find them.
Order a round of drinks.
Find somewhere to sit/stand.
Talk with friends.
Order more drinks.
Drink.
Go to the lavatory.
Look at restaurant and bar snack menu.
Order snacks.
Watch friends play pool.
Chat with barstaff.
Watch other customers.
Get annoyed with a rowdy group of other customers.

LEAVING

Drink up at closing time.
Say goodbye to barstaff.
Go to the lavatory.
Leave pub.
Chat to friends in car park.
Say goodbye.
Drive out of car park.

REFLECTING

Drive home.
Talk to spouse about the evening.
Tell a workmate the next day about the evening before.
Think that the pub has a nice atmosphere.
Decide to try the restaurant one evening.

You may want to repeat the exercise, this time for a visit to an historic house and garden. Consider what you saw in the video A Question of Service *and any of your own experiences. Use the space below, writing in your own headings for each stage of the service journey.*

Here are some suggestions from *A Question of Service*.

PREPARING

Seeing a tourist board brochure.
Deciding to visit the house and gardens.
Deciding to go by bus.
Queuing for the bus.
Catching the bus.
Getting off at the right stop.
Obtaining directions to the house and gardens.
Walking.
Finding signpost.
Approaching house entrance.

JOINING

Returning greeting by staff at the entrance.
Asking for information about house, gardens and prices.
Deciding to visit gardens only.
Paying money and taking tickets.

PARTICIPATING

Seeing gift shop.
Buying guidebook to house and gardens.
Asking for directions to toilets.
Going to the loos.
Sitting on a wall to look at guidebook.
Deciding which paths to take.
Walking and looking around.
Taking photograph of flower beds.
Discussing the way trees are planted.
Taking photo of house from the gardens.
Sheltering under tree in sudden downpour.
Searching for and finding teahouse.
Drinking tea, drying off, chatting.

LEAVING

Following signpost to exit.
Discovering this is not the gate by which you entered.
Consulting guidebook to find way back to your bus stop.
Getting lost and asking the way.

REFLECTING

Waiting for bus and discussing the visit.
Taking bus.
Walking home.
Considering visiting garden in better weather.
Considering visiting house.
Looking at guidebook.
Telling neighbour what there is to see at house and garden.

Session 2: The service journey

The aim of the session is:

- to decide on a particular service journey which your selected group of customers might take in your establishment
- for you and your staff to come to general agreement on what the customers in your selected group might *do* during the five stages of this particular service journey.

The *participating* stage is likely to be the most accurate picture you and your staff build up because of the knowledge you have of your customers' actions while they are actually in your establishment. But the other stages, particularly *preparing* and *reflecting*, will be based on what you and your staff *think* the customers do — which requires putting yourselves in the customers' shoes. The opportunity will come later for checking how these visits match up with what your customers are really thinking and feeling.

You might like to make brief notes below of the steps you need to go through for Session 2 in order to explain most effectively to your staff:

- *what a service journey is*
- *how the service journey can be divided into phases or stages, and what each one covers*
- *how staff can see things from the customers' point of view.*

You will probably find it useful to give each member of staff a photocopy of the service journey form overleaf. If so, the name of the customer group you have chosen can be written on the form before you photocopy it. Alternatively give each member of staff a blank sheet of paper. This has the advantage that they will not feel constrained by the amount of space under each heading, or pressured to give a lot of suggestions under a particular heading. For example some staff may feel that the preparing stage has little or no relevance to your chosen customers.

Staff should be encouraged to express themselves freely. Explain the forms will not be collected, but when staff feel they have exhausted their ideas (or after a reasonable time limit, say ten minutes) they will be asked to agree upon an example of one particular service journey (say, an evening meal, or a swimming lesson followed by a sauna) which your selected group of customers might make on a visit to your establishment.

Useful preparation for Session 2 might be to have a go on your own at describing a service journey your selected customer group might make at your establishment. Organise the information below under the five headings: PREPARING, JOINING, PARTICIPATING, LEAVING REFLECTING.

THE SERVICE JOURNEY

Selected group of customers

Brief description of particular service journey

PREPARING

JOINING

PARTICIPATING

LEAVING

REFLECTING

NOW RUN SESSION 2.

At the end of the session make a note of the particular example of a service journey agreed with your staff, together with a summary of the actions your staff believe the customers in the group would take at each of the five stages of the service journey. This will be a useful prompt for subsequent sessions, and an important reference later when you are required to do Assignment 2 of The customer perspective.

You are also invited to use this space for any reminders or reflections, now you have had the opportunity to run your second session. You may wish to consider some of the following questions:

- *How responsive was the group?*
- *Were some members too pushy, others too retiring?*
- *Did you allow room for staff to develop their ideas, or did you overprompt them?*
- *Are there any different approaches you would like to try?*

3. WHAT YOUR CUSTOMERS EXPECT

In the previous session you dealt with the first step in finding out what your customers feel about the services you provide — by noting what they do. The next stage is to begin to analyse what these actions mean. In other words, what motivates your customers to act in the way they do? One simple answer to this is: their *expectations*. For instance if a bouncer is all smiles to a teenager outside a nightclub at the joining stage, this will influence the young person's expectations of the service in the participating stage. As *A Question of Service* explains:

> Most of our actions are influenced by expectations. These apply as much to major issues in our lives as they do to daily trivia. For example, if we expect heavy road traffic, we are likely to leave home earlier to reach our destination at the correct time. We do not voice all our expectations and many of them seem to exist at a subconscious level — at least, until things go wrong and we realise what precisely we expected!
>
> Expectation is obviously closely linked with purpose. A customer's purpose is usually represented by the participating phase of the service journey. If a customer's purpose is frustrated, then he or she is likely to be dissatisfied. The service journey is, however, complex. It is possible for the purpose of a service journey to be unfulfilled and be unsatisfactory, but for other parts of the journey to make up for this.
>
> On many occasions, the way in which things are done or happen within sight and hearing of customers — the process — is nearly as important as the purpose of the service journey. This may mean that the way in which a meal is served or the way in which a tour guide explains something may be as important to the customer as the food or the visit itself!

Customers on a visit to a hotel, catering, leisure or tourism establishment arrive with expectations varying from the most hopeful to the most fearful. And different expectations will continue to be formed and changed throughout the visit. A bad experience might result in anxiety — fear that something unpleasant will happen again. A pleasant experience will make the customer hopeful that the same will be true this time — which in certain customers can be experienced as a sort of fear: anxiety that something may have changed!

Consider the example of a nurse, journalist or shiftworker who wishes to use the local swimming pool. It is difficult for this person to use such facilities because he or she usually works at night and sleeps during 'normal' opening times. Under the first three stages of the service journey think of what the person might hope for and be anxious about. Write your suggestions below.

	HOPES	***ANXIETIES/FEARS***
PREPARING *Find out the opening times of the pool.*		
JOINING *Get to and into the pool.*		
PARTICIPATING *Swim. Take a sauna.*		

These are some of the suggestions made in *A Question of Service*.

	HOPES	***ANXIETIES/FEARS***
PREPARING		
Find out the opening times.	There is a recorded message of pool information because it is difficult to make enquiries in advance during 'normal' opening hours.	It will be difficult to get information in advance of day off because of own working and sleeping times.
JOINING		
Get to and into pool.	The cashier will explain the prices for use of different facilities/services in the pool.	Change for a £5 note will be needed for changing room locker.
PARTICIPATING		
Swim. Take a sauna.	There is an Olympic-size pool with sufficient space allocated for 'serious' swimming. It will be possible to start to get fit again.	There will be scores of young people messing about in the water so that 'serious' swimming is impossible.
	Saunas are available and are not too expensive.	Sauna will need to be booked in advance.

The dangers of making assumptions

Management and staff often make assumptions about what customers expect, based on their own past experience rather than the facts. Since different people have different past experiences, making judgements on what other people expect is fraught with danger, as details in *A Question of Service* about an exercise carried out by Michael Nightingale and John Coss show. Delegates on a quality service training course were asked to:

- compare what the delegates expected of the coffee break with what the hotel staff believed that the delegates wanted
- assess the extent to which any differences between the two viewpoints affected the success of the coffee break.

The delegates split into two groups. Before the coffee break one group of delegates interviewed members of the hotel staff. Members of the other group listed their individual expectations of the coffee break.

The interviewing group split into pairs and spoke with the hotel staff responsible for providing the coffee break to find out what they thought the delegates expected. They made a list of what the staff believed the delegates expected of the coffee break. This is what the staff said.

General manager	**Food and beverage manager**	**Supervisor responsible for conference services**	**Waiter serving the coffee**
Fresh, hot coffee made with particular equipment and kept in an insulated container. Fresh hot milk. Good clean china. Choice of biscuits. Personal service.	Fresh, hot coffee of moderate strength kept in an insulated container. Fresh cold milk. Clean cups and saucers. Choice of sugar. Personal service.	Fresh hot coffee prepared the 'proper way'. Fresh hot milk. Choice of biscuits. Clean china. Courteous service. Personal service.	Fresh coffee made the way it is made in Colombia (where coffee comes from and where I come from) and not weak as normally served in England. Available on time and hot. Personal and attentive service.

Members of the other group listed their own expectations. Some were similar some not. These are listed below in the order of importance which the delegates gave:

Expectations important to MOST delegates	**Expectations important to SOME delegates**
1 Need for change of environment.	1 Biscuits available.
2 Toilet facilities available.	2 Chocolate biscuits available.
3 Quick service starting on time.	3 Choice of cream, hot milk, cold milk.
4 Hot coffee-flavoured drink.	4 Choice of sugar.
5 Clean cups and saucers.	5 Good quality china used.
6 Choice of black or white coffee.	6 Telephone available.
	7 Telephone messages passed on.

After the coffee break the two sets of expectations were compared. The delegates then spent the rest of the morning comparing *what actually happened* during the coffee break with *their own expectations* and *the perceptions held by the hotel staff* about what delegates expected:

Delegate expectation	**What actually happened**
Need for change of environment.	Satisfactory change of environment.
Toilet facilities available.	Toilets were some way from conference room and badly lit (some lights broken).
Quick service, starting on time.	Break started on schedule: service very slow as everyone served individually, so next session started late.
Hot coffee-flavoured drink.	Very strong coffee, disliked by nearly all the delegates.
Clean cups and saucers.	Satisfactory.
Choice of black or white coffee.	Provided — but see comments above.

The other expectations — the ones mentioned by just some of the delegates — were satisfied reasonably well. Sugar was available and so was hot milk, but there was no cream or cold milk. Plain or chocolate biscuits were provided. Telephones were available, but some way from the conference room. Delegates were able to collect telephone messages from the hotel reception.

Comments on the exercise

"The managers and the supervisor in this case study had broadly similar perceptions. However, they all seemed unaware of the three expectations judged most important by the delegates. Even more interesting is that the waiter was out of tune with both management and customers, deriving his standards from his own cultural background.

"Of course, it was a fluke that the waiter on this particular occasion came from Colombia. On the other hand, the supervisor at least ought to have known how the waiter was likely to serve the coffee and could have done something about it.

"The only perception shared by all the staff — personal service — was not even mentioned by the customers. Note how those providing the coffee break were concerned almost entirely with the 'coffee' whereas the delegates were mostly interested in the 'break'. Of course, the delegate expectations were not exactly the same, but there were no real conflicts between them. The providers could easily have met them all if they had known about them."

Coss and Nightingale say that some people may feel that the exercise covered exceptional circumstances. "Are you sure it has no lessons for your own unit?" they ask.

Their experience shows that it is typical of nearly all sectors of the hotel and catering industry, while similar assumptions and misconceptions about customers' expectations are a major cause of customer dissatisfaction in other service sectors.

Think about the expectations you had on a recent visit to an establishment of your choice (for example bank, restaurant, pub, shop). Were there any particular hopes or fears that you experienced? Record these briefly under the appropriate stage of the service journey. Visit to: (establishment)

	EXPECTATIONS	***FEARS/HOPES***
PREPARING		
JOINING		
PARTICIPATING		
LEAVING		
REFLECTING		

Session 3: What do our customers expect at each stage of the service journey?

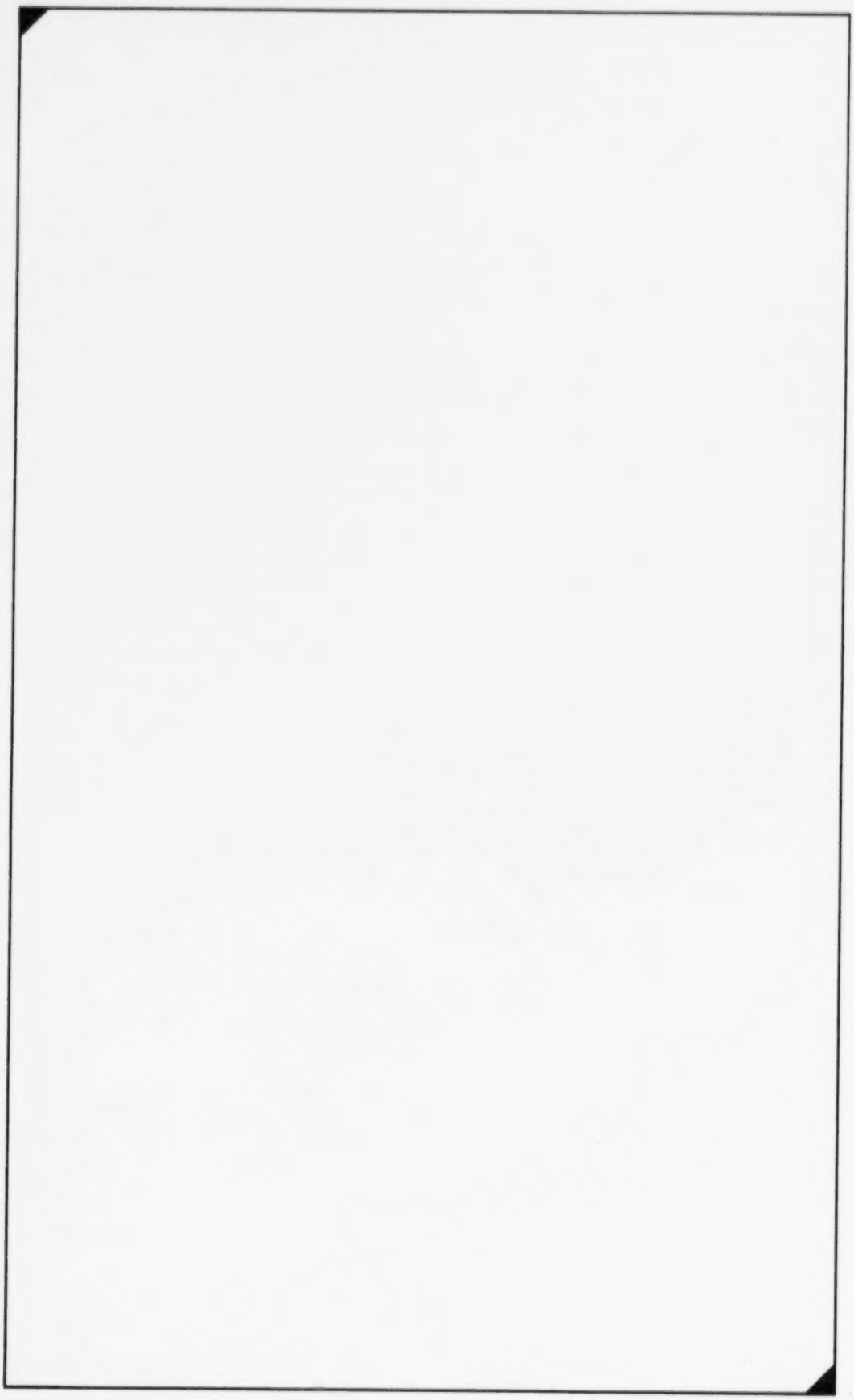
The aim of the session is to get your staff to:

- identify the expectations of your selected group of customers on the particular service journey
- consider what these customers might fear and hope
- look at the effect of these feelings on their expectations
- become aware of the dangers of making assumptions about the customers' expectations.

You can see that this session has to cover quite a lot of ground. Some of your staff may need considerable help in understanding the various influences on customer expectations and sorting out what are likely to be misleading assumptions. You may find it useful to introduce the idea to your staff that so far in these sessions they have used assumptions to identify what they think their customers expect. This is because at this stage they have not started the process of finding out directly from the customers themselves what their expectations really are. Even long serving staff with regular contact with customers — barstaff, waiting staff and reception staff for instance — can make wrong assumptions about what their customers really want. Another useful exercise may be to get staff to make assumptions about each other and find out how accurate — or inaccurate — these are.

To prepare for Session 3 use the space below and on the next page to plan how and in what order you will tackle the various issues — many will arise automatically but staff are likely to need your help in identifying them. Also note any techniques or prompts you might find useful. Some suggestions are given below.

AIM	***TECHNIQUES/PROMPTS***
To identify the expectations of your customer group at each stage of the service journey.	*Encourage your staff to use their own experience and to put themselves in the customers' shoes.*
To consider what customers might fear/hope and the effect of these feelings on their expectations.	*As above. Use the swimming pool example on page 26.*
To understand the dangers of making assumptions.	*As above. Use the coffee break exercise on pages 27 and 28 as an example.* *Encourage staff to describe occasions when they were customers and their needs and expectations were misinterpreted, resulting in disappointment. How could these situations have been avoided or put right?* *Get the group to make assumptions about each other, for instance on taste in music, films, TV programmes, and so on, especially if the members do not know each other very well.*



NOW RUN SESSION 3.

Summarise on this and the next page what your staff have identified as:

- *the important expectations of your customer group under each stage of the service journey*
- *associated hopes and anxieties/fears, and assumptions which are likely to be misleading or dangerous.*

When you have done this complete Assignment 2 of The customer perspective.

	IMPORTANT EXPECTATIONS	***HOPES, FEAR/ANXIETIES, MISLEADING ASSUMPTIONS***
PREPARING		
JOINING		

	IMPORTANT EXPECTATIONS	HOPES, FEAR/ANXIETIES, MISLEADING ASSUMPTIONS
PARTICIPATING		
LEAVING		
REFLECTING		

4. WHAT SERVICES ARE NEEDED TO SATISFY YOUR CUSTOMERS

Customer satisfaction — or dissatisfaction — is created by the many services and facilities the customer uses during the visit to your establishment. If these services are what the customer wants, then the customer will be satisfied. If these services are not what the customer wants (even if the organisation thinks they are), then the customer is likely to be dissatisfied. As *A Question of Service* explains it is necessary to look at things from the customers' point of view — not the organisation's — to find out what is important to the customers.

> Things important to customers relate mainly to their *purposes* and *expectations*. Generally speaking customers seek to fulfil their purposes pleasantly and easily: they are interested in the *benefits to them* of a service or facility and not in the efforts and problems of the staff in trying to bring them about. For example it is largely irrelevant to a customer that her medical records have been mislaid somewhere between her GP and the hospital because of a computer error over her surname. What is important to the customer is that her long-awaited appointment with a consultant will be delayed again — and that she has wasted the time, money and energy in getting to the hospital.

A young woman is taking her four year old daughter by bus to the out-patients' department of the local general hospital for an appointment with a consultant about an ear problem. The child has been unwell and is tired. The woman, who also has her 16 month old son with her, is apprehensive about hospitals because of unpleasant memories of hospital visits when she was a child suffering from chronic asthma. List below some of the things which you think would be important to the woman on the day, at each stage of the service journey, or visit.

PREPARING

JOINING

PARTICIPATING

LEAVING

REFLECTING

How do your suggestions compare with those from *A Question of Service*?

PREPARING

The bus is on time.
The bus driver will be patient while she gets the children and pushchair on board.
It is a short walk to the hospital.

JOINING

The out-patients' department is clearly signposted.
The receptionist does not shout out all the family details for everyone else to hear.
The medical records are to hand — not misfiled again because of the unusual spelling of their surname.
She is allowed to take the pushchair into the waiting room.

PARTICIPATING

The wait to see the consultant is no longer than half an hour.
There are enough chairs for everyone in the waiting room so that she doesn't have to have a child on her lap.
There are toys for small children.
There is a toilet near the waiting room.
The children do not play up or make awkward comments about other patients.
She can accompany the four year old at all times.
Someone can help distract the four year old if unpleasant tests or treatment are involved.
Someone can hold or play with the 16 month old if the four year old patient needs a great deal of attention.
The staff are pleasant and helpful — not abrupt and sneering as in her childhood recollections.
The consultant will take the trouble to explain things until she understands fully.
The child will not be handled roughly or her fear ignored.

LEAVING

She will not have to queue up to make the next appointment.
She can change the 16 month old's nappy somewhere before she leaves.
The bus will not be late.

REFLECTING

This will be determined by her experiences of the service; whether her expectations (hopes and anxieties) were matched or mismatched.

The items, actions, services and facilities which contribute to the quality of the service journey can be broadly divided into the following categories:

- consumable goods
- goods and facilities
- people's actions
- actions behind the scenes.

A Question of Service calls these *service contributions*, and gives some examples in each category:

Consumable goods

These are things that customers 'take away' with them in some way:

Food	Drink
Soap	Toilet paper
Cigarettes	Information leaflets

Goods and facilities

These are things that customers may make use of, but leave behind when they depart:

A passenger lift	Tea-making facilities in guest bedroom
Hired golf clubs	Direct-dial telephone
Central heating	Tables and chairs
Lights	Changing room lockers
Car park	

These are also things which are part of the provision of service facilities, or are part of the service environment, some of which the customer might not see, use or be aware of or may not like:

Dustbins	Fire escapes and fire-fighting equipment
Central heating plant	Cooking equipment
Walls and ceilings	Background music
Decoration	A ferocious thunderstorm
Loud plumbing noises in the night	The view of the local industrial site

People's actions

These are 'observable' staff activities:

Taking a drinks order	Giving entrance tickets
Answering the telephone	Welcoming a customer
Warning a customer not to run on a slippery surface	Cleaning a guest room
	Providing information
Listening to and acting upon a complaint	A helping hand for an elderly person
	Teaching a sport
Serving a meal	Banning a disruptive customer from a pub
Switching the sun-bed on and off	

These are also the activities of *other* customers:

A rowdy crowd	A queue-jumper
An inconsiderate smoker	Someone who gives up their seat to a handicapped person
Someone who strikes up a pleasant conversation with other guests	

Actions behind-the-scenes

Although they occur out of customers' sight, these are crucial staff activities, creating an essential link in the chain of service:

Running the boiler	Chlorinating the swimming pool
Writing an information brochure	Cleaning a guest bedroom
Paying a supplier's bill	Cooking a guest meal
Organising a rota of guides/stewards	Fixing direction signposts

Think of an occasion recently when you were a customer (say at a post office, sports centre, or car repairs garage), and list under the appropriate heading the service contributions which were important to you at each stage of the service journey. Then tick the column on the right which fits the category.

SERVICE CONTRIBUTION

	CONSUMABLE GOODS	GOODS AND FACILITIES	PEOPLE'S ACTIONS	ACTIONS BEHIND SCENES
PREPARING				
JOINING				
PARTICIPATING				
LEAVING				
REFLECTING				

Session 4: What do our customers find important?

The aim of this session is to enable staff to identify what is important to the selected customer group at each stage of the service journey, and to categorise these *service contributions* into consumer goods, goods and facilities, people's actions and actions behind the scenes.

The space opposite is provided for you to make notes in preparation for Session 4 on how you can:

- brainstorm ideas with your staff on what they think is important to the selected group of customers on the visit to your establishment
- encourage staff to see things from the customer's point of view
- show that what is important to the customers can be seen in terms of service contributions, that is factors which contribute to the quality of the visit
- show that each service contribution belongs to a specific stage or stages of the service journey
- show that these service contributions can be usefully categorised into the four types
- reach agreement about what service contributions are important.

You could photocopy the form on the page overleaf, and hand these out to each member of staff after the brainstorming so that they can organise the suggested service contributions into the appropriate stages of the service journey and categories. Setting a time limit of, say, 15 minutes is often a good idea. Alternatively you may wish to use the flip chart, working together as a single group throughout the session.

One way of assisting staff to see things from the customer's point of view would be to ask them for stories of when they were customers themselves, and something went wrong. If possible include minor problems as well as major ones, because minor mishaps are more likely to go unnoticed by staff (though not the customer!), and if they are allowed to accumulate they could lead to a major crisis. If staff know how to detect these minor dissatisfactions at an early stage something can be done to put the situation right. The result can be a very satisfied customer indeed!

SERVICE CONTRIBUTION	CONSUMABLE GOODS	GOODS AND FACILITIES	PEOPLE'S ACTIONS	ACTIONS BEHIND SCENES
PREPARING				
JOINING				
PARTICIPATING				
LEAVING				
REFLECTING				

As further preparation for Session 4 you may find it useful to list below, under the appropriate service journey heading, the service contributions which you think your selected customer group would find important during the visit to your establishment. Tick the appropriate right hand column for each service contribution.

SERVICE CONTRIBUTIONS

	CONSUMABLE GOODS	GOODS AND FACILITIES	PEOPLE'S ACTIONS	ACTIONS BEHIND SCENES
PREPARING				
JOINING				
PARTICIPATING				
LEAVING				
REFLECTING				

NOW RUN SESSION 4.

Afterwards keep any flipchart sheets and transfer the details on to the form on page 42 or directly on to Assignment 3.

If you wish use the space below for any points which occur to you about the last session. Are the staff beginning to work well together as a group? If there are still problems, how could you help them to solve these?

5. WHO CAN GIVE THE CUSTOMERS WHAT THEY WANT?

Every service contribution, from a passenger lift to a smile from a member of staff, is the responsibility of someone, or more than one person, working in that organisation. *A Question of Service* makes the point that:

> Staff probably need reassurance that their roles, however humble they may seem to be, are crucially important to the organisation. Staff have a great deal of power and influence over many aspects of the service journey. In fact they have power and influence over the majority of service contributions.

This power is more obvious in the case of staff who have direct contact with the customers, such as reception and waiting staff, but behind-the-scenes staff — kitchen and housekeeping staff — should be aware that they too have a great deal of influence.

Organise the service contributions you listed in Assignment 3 into the appropriate columns below to find out where your own control and responsibilities lie.

Service contributions for which I have control and responsibility	*Service contributions which are outside my control and responsibility*

Session 5: Who is responsible for giving customers what they want?

The aim of this session is to:

- identify from the list in Assignment 3 all the service contributions which are within the control and responsibility of your staff group
- name the individual(s) responsible for each service contribution
- identify the degree of influence or control of those with responsibility (none, some or considerable)
- get each member of the staff group to make his or her own list of service contributions he or she is responsible for, and to what degree.

For some service contributions, responsibility will be fairly obvious, but be prepared for some confusion among staff where there is no clear division of responsibility, for instance where one member of staff is required to communicate with another.

The form on the page overleaf is for you to photocopy, if you wish, and hand to each member of the staff group to complete. This will act as a reminder to staff of how they as individuals can influence customer satisfaction.

SERVICE CONTRIBUTIONS FOR WHICH I AM RESPONSIBLE	DEGREE OF RESPONSIBILITY		
	None	Some	Considerable

Use the space below for any notes you wish to make in planning Session 5, for instance:

- *how you will remind staff of the service contributions they selected in Session 4 (it will probably be useful to display the original flipchart sheet)*
- *how you will introduce the idea to staff that they have the power and influence to satisfy the customers, whether they work behind the scenes or have direct contact*
- *what is the best way to reach some consensus on which individual(s) is/are responsible for each service contribution, and the degree of control or influence, especially where responsibility may be unclear or shared*
- *do you want to include service contributions which are the responsibility of colleagues who are not part of the staff group?*

It may help you in preparing for the session to think of the members of your staff group who work behind the scenes, and note below the five major contributions which are their responsibility and over which they have a large amount of control. In what way could customers be affected by the staff providing these services?

SERVICE CONTRIBUTIONS	STAFF RESPONSIBLE	HOW CUSTOMERS AFFECTED
1.		
2.		
3.		
4.		
5.		

NOW RUN SESSION 5.

Keep any flipchart sheets and transfer the relevant details to Assignment 4 of The customer perspective.

By now you will probably have gathered that running these sessions with your staff is a learning process for yourself as well. Like them you are learning more about the customers, and also more about yourselves and each other. Are there any comments you would like to make below on what running these sessions has taught you?

6. FINDING OUT WHAT YOUR CUSTOMERS WANT

So far you and your staff have considered only what you *think* the customers want — based on your own experience, and by trying to see things from the customer's point of view. While this has been undoubtedly useful, the process has involved making assumptions which may — or may not — be the right ones. A more reliable way is for staff to find out from the customers themselves, by:

- asking customers directly
- talking with customers
- observing customers
- listening to customers.

Summarise below what the organisation and staff could do to find out what your customers want.

There are several ways to find out what customers want. *A Question of Service* makes some suggestions.

Talking with customers
Informal conversations
Structured conversations
Passing comments
Telephone conversations

Customer/public meetings
On a one-to-one basis
Formal meeting
Semi-formal meeting

Listening to customers
Their comments to staff
Their comments to others

Observing customers
What they seem to like and dislike

Interpreting written information (including records)
Customer suggestion or comment slips
Customer questionnaires
Complaints book
Administrative and financial documentation, including reservations and bookings

Devise a simple customer questionnaire overleaf to find out:

- ***how often the customer uses your establishment***
- ***the purpose of the visit***
- ***how the customer rates various aspects of the service such as:***
  - ***— staff helpfulness***
  - ***— speed of service***
  - ***— variety of food on offer***
  - ***— other important service contributions***
  - ***— way in which problems, if any, were dealt with by staff***
- ***how the visit could be made better.***

This real-life questionnaire is reproduced from *A Question of Service*. It may give you some helpful suggestions, particularly on how to keep responses brief so not as to over-burden the customer and end up with results you cannot make sense of.

The Visà Vis Café

ADMIRALS WALK · ROMLEY

Please help us to help you — by completing this card and dropping it in our Comments Box. You could win a dinner for two: weekly draws are made every Saturday.

Please tick:

☐ First visit	☐ Second visit	☐ Regular visitor
☐ Early morning	☐ Midday	☐ Evening
☐ Breakfast	☐ Lunch/dinner	☐ Snack

Please indicate how you rate us by circling a number

	Excellent	Good	Average	Poor
Staff helpfulness	4	3	2	1
Speed of service	4	3	2	1
Variety of food on offer	4	3	2	1
Cleanliness	4	3	2	1
Decor and comfort	4	3	2	1
Atmosphere	4	3	2	1
Other customers	4	3	2	1
Offering of alternatives	4	3	2	1

Additional comments_____

_____

Please tick:
Did any problems occur ☐ Yes ☐ No

If yes please tell us briefly whether it was resolved promptly and to your satisfaction:

_____

_____

Please tell us what you especially like here:

_____

_____

Please tell us what we can do to make your visit even better:

_____

_____

Additional comments:

_____

_____

Session 6: What should we do to find out what our customers really want?

The aim of this session is to give staff the opportunity to:

- suggest ways in which they can obtain information directly from customers on what they want
- discuss the advantages and disadvantages of the different methods suggested
- air staff reluctance about such direct communication with the customers
- discuss an outline plan, including timetable and individual staff roles, for obtaining the information and giving feedback.

This session makes the quantum leap from theory into action — communicating directly with the customer. You will need to be prepared for reluctance among some staff through shyness, inexperience or other reason. Staff who do not have close contact with customers in their daily work, for instance kitchen staff, may experience real fear at the thought of having to obtain specific information from customers. Patience and understanding will be required on your part. Another barrier which you may have to tackle is the attitudes of those who run the organisation. *A Question of Service* gives some of the excuses you may hear:

> *It's not the usual way we do things*
>
> Some service organisations make no attempt to consult customers or consultation took place before most staff joined the organisation. Action to find out what customers want may therefore seem a radical departure!
>
> *We do it anyway*
>
> Staff who work in areas where customers normally go often do ask customers' opinions. But what happens to these comments? Many customers would say 'nothing'. Are they ever translated into customer service? Many customers would say 'no' or 'only occasionally'.
>
> *It's not my job*
>
> Staff who work in areas where the customers do not normally go may feel that it is difficult or impossible for them to deal face-to-face or by telephone with customers during their normal working day.
>
> *Do I have to?*
>
> Some staff appear to be reluctant to talk with customers. This can result from staff's lack of personal confidence, insufficient practice, fear of hearing criticism, shortage of time (because it is not seen as a job priority), misunderstanding of what service or the job involve, not enough encouragement by management, or inadequate response to comments they have previously passed on from customers or other staff.

You also need to be aware of the dangers of trying to obtain specific information from your customers. One of the worst traps you and your staff could fall into is to drive the customers away in the name of trying to improve your service! Remember too that most staff will be totally inexperienced in this sort of information gathering work and, at least to begin with, consideration for the customer may take second place to making sure all the intended questions are asked and accurate answers recorded. So it is essential that appropriate methods of obtaining information are used, and only from willing customers. One way, if staff are speaking directly to customers, is to start with a specific introduction and explanation which staff have decided upon during this session and can rehearse in advance. If this introduction makes clear that you are trying to improve the service, the customers are more likely to want to take part. The following (adapted) extracts from *A Question of Service* raise other relevant questions you and your staff might want to consider.

- How will customers react to the various ways of collecting their views? How will the group collate and interpret the information?
- Many staff have ample opportunity to listen to customers' views. Nonetheless they may need to learn to register when customers are telling them about their expectations, likes and dislikes because people do not always think about their expectations or express their views directly. It's worth watching out for these clues:

  "I expect..."
  "We were looking forward to..."
  "It doesn't matter to me whether..., so long as I can..."
  "It's really important for us to..."
  "I would like..."
  "I really wanted..."
  "We are looking for..."
  "I thought it would be possible to..."
  "I assumed that..."
  "We are disappointed that..."
  "I'm delighted to find..."
  "It's just about right..."
  "We didn't know it was going to..."
  "It's rather surprising..."
  "It's just what I needed..."

- Do staff think it is sufficient to get a general feeling for customers' views? Or are there any advantages in recording these comments and views? If so how could group members 'log' informal customer comments? Would doing so alter services for customers on a day-to-day basis?
- Some staff will be able to create opportunities to chat with customers. Could staff include easy-going questions to find out customer wishes?
- Would staff benefit from a prompt-list of questions about customer expectations?
- What benefits can the group see from organising more formal, structured conversations? (Some operations provide adequate opportunities for engaging customers in structured conversations or face-to-face questionnaire answering.)

- Would customer comment slips or a customer service questionnaire be appropriate? Customers do not always complete comment slips and questionnaires — can staff think of ways to encourage customers to complete and return them? Would it be more appropriate for staff to ask the questions and fill in the customer's response? How can comment slips and questionnaires be designed to encourage customers to give their views rather than stifle them?
- If comment slips or questionnaires are already used, ask the group members to consider what happens to information already collected in this way. Can they think of ways of improving the value of the information collected?
- Some customers feel awkward when asked to give their views about service to someone involved in providing that service. Do staff think that some of their customers would use a customer comments telephone. It could either be a staffed extension number, or it could even be an answering machine inviting customers to leave comments anonymously or by name.
- Would it be more appropriate for staff to telephone recent customers to collect their views? Could staff arrange visits to the home/workplace of regular clients to find out why they are regulars and what they like and dislike about the service?
- Some staff rarely come into direct contact with their customers and are dependent upon morsels of information — often only complaints — scattered by colleagues. If these staff are to play a full part in service, they must be given the opportunity to make direct contact with some of their customers. Here are a few ideas to start the discussion:
  - a chef is given the time to visit the restaurant and talk with customers at their tables
  - the chef takes to chance to talk while carving meat in the restaurant
  - housekeeping staff work as waiting staff from time to time or shadow a colleague in reception or bars during a working day
  - if group members favour special trips to visit regular customers to collect their comments on service, kitchen and housekeeping staff, for example, should participate.

If it is really impossible for certain staff to contact their customers directly, then the group must ensure that these colleagues play an important part in collating and interpreting the information collected about customer wishes.

- Observation can provide useful clues about customer wishes. For example:
  - — a long queue of irritable guests at a hotel reception desk, waiting to check out
  - — an elderly customer having difficulty getting up from a low, soft couch without arms
  - — a smile
  - — a word of thanks
  - — a customer walking out in frustration.

What kind of clues can staff spot? What dangers are there in interpreting such clues?

- Staff's own experiences of being a customer can also provide some information about what customers want, but this information bears the risks of assumption.
- Most organisations keep records which can provide some information about customer wishes. These include reservations, bookings, orders, sales, receipts, enquiries, customer letter files, complaints books, compliments, returns, profit and loss accounts. Such indirect ways of finding out customers' views are useful to:
  - — provide a broad, general perspective
  - — indicate trends
  - — compare and contrast with views obtained directly from customers
  - — enable staff whose work is mainly behind the scenes to gain a better awareness about the things customers find important.

It is probable that the actual times when staff are questioning customers may eat into the work schedule, and so you will have to make sure that the appropriate supervisors and managers are kept in the picture. A good idea would be to speak to them before the session takes place, so that your staff group do not decide on some action which would be totally unacceptable to their colleagues and boss.

Organising the logistics of a project like this will be a mammoth task, and you will need to explain this to your staff. Perhaps starting off with a small, easily-manageable project would be best, for instance if staff were to concentrate on just one or two stages of the service journey made by your selected group of customers.

You may find you need two sessions to organise everything required.

Another point, whatever the extent of your initial project you will need the support of senior management. So try and keep them informed, especially about any problems which you cannot deal with alone.

The more careful your planning of Session 6, the better. Notes you may wish to make opposite could cover:

- *how you would introduce the idea of communicating directly with customers — through talking, listening and observing*
- *how would you encourage staff to brainstorm different ways of finding out what the customers want and consider how these suggestions would work in practice*
- *how you would reassure staff who are reluctant for example through role play exercises or pairing staff so the more confident can help the less experienced, or, if some staff feel they just cannot cope, creating other roles which do not involve direct contact with the customers*
- *how the above aspects can be translated into an outline plan of action (no need to make firm or detailed decisions yet), including:*
  - *what staff will try to find out*
  - *what methods are used*
  - *the role of individuals and/or small groups*
  - *how individuals can record results accurately*
  - *how long it will take*
  - *when and how staff will feed back the information to each other.*

NOW RUN SESSION 6.

There is no assignment, but you may find it useful to summarise the session below. Did you find that you probably needed another similar session to this one in order to get everything done? If so you might want to do your planning in the space below.

7. ASKING THE RIGHT QUESTIONS

Answers from customers need to be relevant to the overall aim of finding out what the customer wants. This means that the questions staff ask must be chosen so that they seek the appropriate information. Even the wording of a question and, if it is voiced, the tone in which it is asked can influence the way customers reply.

An *open* question allows a wide range of response, and cannot be answered by a simple yes or no. Open questions often start with the word what, how, which, where, when or why. A *closed question* influences the response in some way, and can usually be answered by a simple yes or no. Both open and closed questions have their uses, as *A Question of Service* indicates:

> An *open* question usually encourages customers to give their free views, without guidance from staff — 'What sort of thing did you like here?' A more *closed* question may be useful when customers are lost for an answer, but may also suggest the kind of answer the staff are looking for — 'Did you like the avocado starter?'

Closed questions are also particularly suitable for questionnaires where the customer is required to tick a yes, no or don't know box, or where the *extent* of a customer's feeling or opinion is sought.

List under the appropriate heading below two open questions suitable for each of the five stages of the service journey at your establishment. Some examples are given to start you off.

PREPARING
How did you find out about this place/organisation?

JOINING
What were your first impressions?

PARTICIPATING
What did you think of what you found here?

LEAVING
What do we do, or fail to do, to make you want to come back?

REFLECTING
What will you tell your friends, family or colleagues about us?

Other kinds of questions might focus on:

- *Customer purpose* Why did you come here?
- *Customer expectation* What did you think (expect) you would find here?
- *The service process* What happened? What did you like or dislike?
- *The outcome* What was your overall impression?

Some of the most open questions of all are:

- What does good service mean to you?
- What do you want out of the service we offer?
- What are the things which are important to you when you are our customer?

It is often a good idea to give customers the chance of expanding on their answers, either by inserting a line for further comments in a questionnaire, or by asking customers directly, for instance, 'Is there anything else you would like to add?' If staff speaking directly to customers do not fully understand a customer's answer they can ask for clarification with, 'What do you mean by x?' or 'Do you mean x, y or z?'

Here are some suggestions from *A Question of Service* on how to keep questions to the point.

Think in terms of what is important to the customer at each stage of the service journey. This may help staff decide on collecting methods which reveal not only what customers hold expectations about, but also degrees of expectation and importance for individual customers.

However staff ask for information, they may find it helpful to work towards answering the following sorts of question:

- What do customers hold expectations about?
- What kinds of expectations do customers hold for each stage of a service journey?
- How many expectations relate to the main purpose of the journey? What are they?
- Do customers' expectations differ during separate trips through similar service journeys through your workplace? How and why do they differ? How much, if at all, do customers' moods affect their expectations?
- How many and what kind of expectations relate to 'things which happen' which are only indirectly related (or not linked at all) to the purpose of the journey? How do these affect customer satisfaction?
- How do expectations formed during one service journey affect expectations for the next journey? Do some things become more or less important to customers during the journey?
- What is really important to customers? What satisfies them?
- How important are variables such as:
  - range and degree of choice
  - size
  - temperature
  - time
  - flavour
  - comfort
  - social status
  - atmosphere
  - convenience
  - price and value for money?
- What is really unimportant to customers?
- If customers faced a choice, which parts of your service would they wish to keep and which would they be prepared to forgo?
- What kinds of mismatch do customers find between their expectations and what they actually experience?

Session 7: How can we make sure of asking the right questions?

The aim of this session is to complete the work started in Session 6, that is to make final decisions on:

- what information you and your staff need from your group of customers
- the questions which will obtain this information (including how they should be worded)
- the best methods to use (questionnaires, meetings, personal interviews, and so on)
- which staff should do what, and when
- how staff can record customers' answers
- how staff can feed back the information collected to the staff group
- the overall timescale.

You might want to make brief notes below and opposite of the steps you need to go through for Session 7 in order to achieve its aims effectively. For example:

- *the importance of linking the information sought with the questions asked*
- *what open and closed questions are, and their uses*
- *the dangers of annoying customers if the wrong approach is taken*
- *how customers' answers can best be recorded and made sense of (as answers pile up, staff may become confused unless there is some kind of logic to the process).*

Have your staff expressed a preference as what their first 'live' project should cover and the methods to be used to obtain the information from your selected group of customers? (Refer to your summary of Session 6 on page 62.) You may find it useful to devise below a practice questionnaire, prompt list of questions, or other appropriate research material.

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Now is the time to make sure you obtain the cooperation of the supervisors and heads of departments who will be affected by the actions of your staff. Use the space below for notes if necessary, on how you can best explain in general terms what you and your staff have decided to do. (Be prepared to negotiate or come up with alternatives if any of your ideas are considered too disruptive to the work routine.) Also inform senior management, and discuss with them the implications as far as the customers are concerned. This may also be the opportunity to discuss any problems, and to get senior management approval on any points. (After this session you may have more detailed information which needs to be passed on to everyone concerned.)

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NOW RUN SESSION 7.

Afterwards complete Assignment 5 of The customer perspective *on how you and your staff plan to obtain the required information from your group of customers.*

Are there any problems which still need to be ironed out, or which you can foresee? For instance are staff happy in the roles they have? Do you need to be prepared for disappointment, anxiety or competition between them? What action would you take if a customer, another department, or senior management made a complaint about the project? You may find it helpful to make a few 'warning' notes for yourself below.

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8. MAKING SENSE OF CUSTOMERS' ANSWERS

Once staff members have collected the results, they need to be able to summarise what they mean, not only for their own information but also in order to explain to other members of the group. As more and more results are collected the need for an appropriate method of organising them becomes crucial. One way is to categorise them into:

- comments on each stage of the service journey
- what customers find most important.

Some staff may do this instinctively, and even invent their own categories, while others will need some prompting from you. Some staff may be fearful of speaking to the group, for instance if they are shy or if English is not their first language.

By categorising answers you will find the *strength* and *balance* of feeling and opinion amongst your group of customers, and you can begin to consider what the organisation and staff need to do to bring about the kind of service customers say they want. However, at this stage, remember that information about what your customers want may still be rather sketchy, and to make changes in the service now would be unduly hasty. There may even be conflicting information within the group.

One way of trying to make sure that the information is as accurate as possible is to encourage staff to challenge each other and themselves on assumptions (in their summing up and in their method of collecting answers). Do make sure that staff do not become disillusioned. Some members may be full of enthusiasm, others bewildered by the process — either way they will need your support.

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Note below ways in which you could support your staff during this session.

Session 8: What is most important to our group of customers?

The aim of this session is to identify from the answers given by your group of customers:

- what is most important at each stage (or the stages your staff covered) of the service journey
- what are the six most important aspects of the service.

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The space below is for you to make notes, on:

- *how you might eliminate confusion among staff in deciphering results and feeding them back to other members of the group*
- *how to get staff to distinguish between the value of comments gained directly from customers and information collected from sales and booking records or other secondary sources*
- *how to introduce discussion on problems staff experienced in communicating with customers, and how approaches could be improved in the future.*

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As this is the final session of The customer perspective, *use the space below to help you plan a review (with your staff) of the project so far. How can you best make clear that their research is a small part of a continuous monitoring process, that more information will be needed and that the exercise will have to be repeated for other customer groups, before changes can be made to the service.*

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NOW RUN SESSION 8.

Afterwards summarise your staff's findings in the two parts of Assignment 6 of The customer perspective.

You may want to note below and overleaf the main points your staff made in their review of the project so far. Are there any changes in how the sessions are run which they would like to make? Do you need to give some time to members who wish to speak privately with you about some matter concerning the project? What sort of reaction did you get from the customers, and are there any changes in approach you would make in this respect?

SECTION 2
Customer service standards

After completing this section you and your staff will be able to:

- identify possible conflicts of interest and constraints which prevent the major customer expectations from being met
- identify customer service standards which will meet the major customer expectations
- identify what the staff need to do to convert these service standards into action to satisfy the customers.

It will help you prepare for and run discussion sessions 9, 10 and 11 with your staff and from the results of these complete the three assignments on *Customer service standards* in your *Operational Management Planner*.

9. CONFLICTS OF INTERESTS AND CONSTRAINTS

No two customers want exactly the same thing, even if they come from the same customer type. There are bound to be conflicts of interest, for instance one customer may want background music, another will not notice it, while a third will find it irritating. While it may not be possible to satisfy all the customers all of the time, the organisation and staff need to develop an understanding of what customers like and dislike so that they can make the right decisions on the kind of service that will lead *overall* to customer satisfaction.

A Question of Service gives some examples of conflicts of interest.

> Visitors using a swimming pool for 'serious' training and those using it for splashing about and 'having fun'.
>
> Stately home visitors who want to wander around at their own pace and others who want a guided tour that will last for an hour, for example.
>
> A nursing mother who wishes to breast-feed her baby and a customer who feels that this is a form of indecent exposure.
>
> Customers who wish to smoke and those who find this unhealthy or distressing.
>
> Customers who want to park as close as possible to a venue and others who object to car parks which they feel detract from the surroundings.

Refer to the spidergram you drew in Assignment 1 of The customer perspective *to remind yourself of the different types of customers your staff identified earlier. Note below some possible conflicts of interest between* four *of these different groups of customers, and suggest why each conflict might arise.*

Even when organisations and staff believe they know what their customers like and dislike they may still think that it is impossible, in certain areas, for them to provide what the customers want. In fact, very often, it is perfectly possible. But what the organisation or the people working within it sometimes do is to put up barriers. Attitudes like 'This is the way we have always done it' are often an excuse — possibly completely subconscious — for not responding to customer wishes.

This too can be seen as a conflict of interest — between what the customers want and what the organisation and staff feel they are able to provide. *A Question of Service* calls this kind of conflict of interest a *constraint*.

A constraint is usually explained as being something which limits what we can do. We live with many, including legal, moral, social, religious, financial, corporate and self-imposed constraints. Perceptions about these limits may vary according to your viewpoint: as *negative restrictions* upon aims, action and behaviour, or as *positive and useful guidelines*, boundaries or 'shape' to action. So it is not unusual to find that the reasons for the existence of an organisation — for example to make a profit or to preserve the heritage — create constraints upon an organisation's wish to provide the services its customers want. Other typical constraints are:

- organisational aims and objectives
- departmental/organisational rules
- departmental/organisational practice
- personal/departmental/union power and influence
- the law
- staffing levels
- time
- money
- level of staff training and experience
- a belief that the organisation does not care — either about customer service itself and/or about staff
- views on customer service.

Draw up your own brief list below of the stated aims and objectives of your company or organisation. You may find it helpful to consult senior management and to get hold of documents such as:

- *the organisation's certificate of incorporation, Act of Parliament, charter, trust, or charitable rules*
- *annual reports to staff, shareholders, trustees*
- *internal memoranda*
- *letters to trustees, governors, board members.*

Session 9: How can we resolve conflicts of interest and lift constraints which prevent us satisfying our customers?

The aim of this session is to enable your staff to:

- identify possible conflicts of interest and constraints which might prevent the five or six key customer expectations from being met.

Staff are likely to mention during this session the constraints they feel are put upon them by the company. Help them to discover that:

- some constraints are only real because everyone has assumed that they are constraints
- organisational constraints need not always be obstacles to creating customer satisfaction.

The space opposite is for notes to prepare yourself for Session 9. One aspect you may want to consider is how you can introduce to your staff the link between conflicts of interest/constraints and their effect on customer service standards. Others are how you can best encourage your staff to:

- *identify possible conflicts of interest between individual customers and between customer types*
- *identify constraints on the part of the organisation and staff*
- *differentiate between the constraints which are necessary and those which exist for the convenience of the staff and organisation*
- *discuss creative solutions to overcome conflicts of interest and constraints.*

You may also find it useful to note what you think are the organisational and/or staff constraints which might prevent the key customer expectations from being met (see your summary of customer expectations in Assignment 6 of The customer perspective*). Are these constraints absolutely necessary, or do they exist merely for the convenience of the staff or the organisation?*

NOW RUN SESSION 9.

Keep details of the conflicts and constraints which your staff think prevent the five or six key customer expectations from being met, and transfer the relevant information to Assignment 1 of Customer service standards.

You may wish to summarise the session below.

10. WHAT STANDARDS OF SERVICE SHOULD YOUR ORGANISATION OFFER IN ORDER TO MEET CUSTOMER EXPECTATIONS?

The Collins Cobuild English Language Dictionary† defines a standard as:

- "A level of quality of achievement, especially a level that is thought to be acceptable."
- "Something used to measure or estimate the quality or degree of something, for example how good a piece of work is."

The dictionary also notes that standard is used "to describe something which is usual and normal rather than being special or extra."

A Question of Service has this to say on standards:

> Everyone has standards, every organisation has standards — even when we do not recognise these standards.
>
> Sometimes we use a different word to explain a standard. We might, for instance, talk about expectation, belief, morality, values, aims or habit. If we disapprove of standards, we might even use the comment 'They have no standards.'
>
> It is important the group members acknowledge that all their customers have standards — whatever they call them. They are shaped by the kind of influences which shape expectations. Standards within the organisation are influenced in a similar way. Organisational standards are also influenced by organisational aims, convenience, personalities and so forth.
>
> Factors which shape standards for individuals and organisations include:
>
> - house rules
> - what a customer expects
> - what the organisation wants
> - Acts of Parliament
> - tourist boards
> - consumer organisations and guides
> - tradition
> - beliefs (including religion and politics)
> - social pressure
> - cultural norms
> - personal and group experience
> - local authorities
> - fashion trends
> - level of staff training
> - organisational resources.
>
> On a day-to-day basis few people are aware of the influences upon standards. Many standards are held subconsciously, or are not expressed directly. While this is largely unimportant for customers themselves, it is crucial that staff learn to spot, interpret and act upon any clues that customers give about their standards.

Service standards can be viewed from two distinct viewpoints:

- the customer
- the provider (that is the organisation).

To this may be added a familiar third viewpoint:

- the individual staff member (as in the case of the Colombian waiter on page 28).

The problem is that many provider-organisations and individual staff members overlook the customer's view.

† *Collins Cobuild English Language Dictionary*; William Collins Sons and Co Ltd, London, 1987

Indicate for each of the following standards whether they are expressed from the organisation's or the customers' point of view.

	Organisation	***Customer***
1. *We expect a prompt and polite answer to our phonecalls.*		
2. *Cashiers will alert visitors to the need for 10p coins for changing room lockers and will have a ready supply of coins.*		
3. *There will be sufficient light and space in the guestroom for reading and writing.*		
4. *Lists of facilities which are open today will be displayed prominently in a place* before *entrance fees are paid.*		
5. *Lists of facilities which are open today are displayed prominently in a place* before *entrance fees are paid.*		
6. *Lights bulbs over dressing tables/ writing desks must be 60 watts.*		
7. *The receptionist/cashier will tell me that I need 10p coins for the changing room locker and will provide me with change if necessary.*		
8. *There will be a visitors' guide book available at all times.*		
9. *The telephone will be answered before it rings four times, between 7am and 11.30 pm.*		
10. *There is a visitors' guide book available at all times.*		

1, 3, 5, 7 and 10 are standards expressed from the customers' point of view.

2, 4, 6, 8 and 9 are standards expressed from the organisation's point of view.

One way of finding out whether an organisational standard is really necessary is to ask yourself 'Is the standard shaped by customer expectation and satisfaction?'

A Question of Service says that:

> A standard may be judged as being a necessary and suitable standard if it:
>
> - meets customer expectation
> - creates customer satisfaction.
>
> Important though these two criteria are, they are not the only realistic ways of judging the necessity for, and suitability of, standards. Factors such as:
>
> - the provider-organisation's aims
> - constraints, such as cost, staffing levels and geography
> - conflicts between customers
>
> are also crucial in determining standards.
>
> The skill is to create the right balance between the demands and constraints of the organisation and the expectation and satisfaction of customers.

Session 10: What service standards are needed to satisfy the key expectations of our customers?

The aim of this session is to agree on the service standards required to meet the five or six key customer expectations you and your staff have identified.

To prepare for Session 10 you may wish to make notes below on how you can:

- *encourage staff to identify examples of standards set by the organisation*
- *explore the difference between standards from the organisation's point of view and standards from the customers' point of view.*

Consider each of the five or six key expectations of your customers (see Assignment 6 of The customer perspective*), and write brief details below of a customer service standard which you feel the organisation/staff already provide, or could provide, to meet each expectation. Also note how the service standard would resolve or overcome the conflicts of interest and constraints you identified in Assignment 1 of* Customer service standards.

KEY CUSTOMER EXPECTATION	***CUSTOMER SERVICE STANDARD***	***HOW IT HELPS OVERCOME CONSTRAINTS AND CONFLICTS***

NOW RUN SESSION 10.

Afterwards summarise in Assignment 2 of Customer service standards *the customer service standards agreed by your staff.*

The space below is for any notes, reminders and reflections you may have.

11. WHAT ACTIONS DO STAFF NEED TO TAKE TO PROVIDE THE NECESSARY SERVICE STANDARDS?

An organisation can have all sorts of customer service standards, but unless staff know what these are and can act upon them, the customer will never feel the benefits. Standards can exist in several forms, as *A Question of Service* explains:

- flexible — for example consumer trends
- formal — for example criteria for a hotel to warrant AA three-star rating
- stated — for example 'To qualify for AA three-star rating, a hotel must provide'..., or 'All staff are required to...'
- unstated (usually informal or unofficial but often custom and practice) — for example 'We have always done x in this way', or 'We use the guest entrance because it is quicker'
- subconscious — for example there are many things we do not think about clearly until something goes wrong: a customer may not be aware that she considers a good cup of tea to be strong, hot and served with milk until she is given a weak beverage, with a slice of lemon in it.

Some standards may be categorised in more than one way. Some standards may be the norm, but are totally unofficial. *A Question of Service* gives some more examples:

Flexible
What information you give to sports hall users.
What brand of light bulb may be used.

Inflexible
No running along poolside.
Staff Only signs to be fixed on boiler room and kitchen doors.
What sort of footwear guests can wear to visit a stately home with a valuable floor and carpet.
How many hangers there should be in guest wardrobes.
How many hours staff may work per day.

Stated
How to answer the telephone.
How to serve a bottle of wine.
Guest room towels will be changed daily.
All staff will wear full uniform whenever they are on duty.
Staff jewellery is not allowed, except for a plain wedding ring.

Unstated
Staff will do their best to help elderly and less-mobile visitors to negotiate the steps.
Everyone will try to appear cheerful at all times.

In many organisations the form of some standards is just allowed to evolve without anyone questioning whether it is the most appropriate way of communicating to staff, customers and others, so that the customers' expectations are met.

Give two examples under the appropriate heading to show how customer service standards are expressed in your own workplace. Indicate in the right hand column another way of communicating the service standard which you think might be more appropriate.

CUSTOMER SERVICE STANDARD	***MORE APPROPRIATE FORM***
Flexible	
Inflexible	
Formal	
Stated/written	
Unstated	
Subconscious	

One type of customer service standard which needs to be expressed clearly, so that staff can understand, are guidelines on how certain tasks should be done. Even the simplest job needs explaining when it is being done for the first time or if the establishment has a particular way of doing it. (More complicated or numerous tasks may require special training.) These guidelines — they translate standards into *action* which staff can take to satisfy a customer — are called *operational specifications*. *A Question of Service* gives some examples:

- If a guest orders a half pint of beer or lager and returns a pint glass which still contains a quarter pint of beer/lager, then the half pint will be measured in a clean half pint glass and poured into the returned pint glass.
- For continental breakfast supplied to guestrooms, clean trays will be laid with cup, saucer and teaspoon; side plate and knife; coffee pot/tea pot (polished and stain-free); milk jug; four sachets of white sugar, four of brown, one of saccharin placed in a basin, one marmalade, one preserve pot on doiley on plate; two croissants in wicker basket.
- A pH test will be taken at each pool four times a day using No 1 tablets and a Lovibond Comparator.
- Two fresh seasonal vegetables will be offered on the menu each day with consideration given to the colours of the vegetables and the main dishes of the day.

Such operational specifications obviously affect customer service, but they only become important to customers when they become visible, or have an impact (noise from the kitchen), or if something fails to meet expectation or goes wrong. Even then, the operational specification itself is not important to the customer. The important thing is the impact it has on the customer.

For example, a guest might or might not notice whether breakfast preserves pots were on a paper doiley, but she would notice if the preserves were missing. A swimmer is unlikely to care how many times the pH is tested at a pool unless the water hardness affects his skin or eyes. A couple having lunch are not interested in what the chef's operational specifications are. They are interested in an attractive-looking, well-presented, tasty meal in a pleasant atmosphere.

Write below a brief operational specification for three tasks done by staff in your department, and describe what you think is the most appropriate way of communicating each to staff who need to know.

Session 11: What we must do to ensure that customer service standards are reached?

The aim of this session is to:

- agree the operational specifications required to put each identified customer service standard into practice
- agree who is responsible and what additional facilities, if any, are needed.

You may wish to use the space below to prepare for Session 11. How, for instance, might you approach a discussion with your staff about further training, should they feel it appropriate?

For each customer service standard you described in Assigment 2 of Customer service standards, *note below how you could organise most effectively the necessary resources (staff and facilities) to convert the standard into* action. *Where appropriate, express what needs to be done in terms of operational requirements. (You may find it useful to refer to the service contributions you and your staff defined in Assignment 3 of* The customer perspective.*)*

NOW RUN SESSION 11.

Complete Assignment 3 of Customer service standards.

Are your staff beginning to take responsibility for providing customer care? By now the sessions should ideally have their own momentum, and you should be conscious of allowing this to happen by giving group members a 'longer lead'. Use the space below and overleaf to express any thoughts you may have on this issue, and on how your staff have approached the problems of customer service standards.

SECTION 3
Quality control

After completing this section you and your staff will be able to:

- identify means of measuring and recording customer satisfaction
- establish ways of communicating your findings to other staff
- evaluate how successful you have been in providing what your selected group of customers wants
- recognise how you have developed during the project
- establish systems of communication with senior management
- devise ways of keeping up the momentum of the project.

It will help you prepare for and run discussion sessions 12 to 17 with your staff and from the results of these complete the three assignments on *Quality control* in your *Operational Management Planner.*

12. MEASURING AND RECORDING SUCCESS IN MEETING CUSTOMER EXPECTATIONS

In Assignment 2 of *Customer service standards* you identified several standards to satisfy the expectations of your customers. The next step is to find ways of *measuring* how successful you and your staff are in meeting these expectations. By doing this you keep in touch with what customers like and dislike about the service provided, and can make changes in standards as required. *A Question of Service* describes the two major types of measure:

> By now staff should be accustomed to judging customer service by measuring it against what customers *say* they want (and by what they *seem* to want). It cannot be over-emphasised that the (staff) group and the organisation need for refer continuously to what their customers want — what their customers find important. This is the main way to measure whether customer service is matching customer expectation. The other measure is, of course, whether or not the organisation is matching its aims. The value of this measure depends on how far these aims have been shaped in the first place by what the customer finds important.

Examples of specific methods of measuring success in meeting your customers' expectations might be:

- reduction in waiting time
- increase in time spent talking with customers
- letters of complaint received by the organisation
- number of positive adjectives overheard
- press coverage which gives an indication of public awareness and trends.

List below two methods (one based on what the customers say or do, the other based on whether it follows the aims of the organisation) by which each of the customer service standards identified in Assignment 2 of Customer service standards *could be measured. Try to select ways which are suitable to your organisation, and the staff member(s) responsible for achieving the service standard.*

Once your staff have decided on appropriate methods of measuring their success in providing services to the customer, they will need to decide on the best way of keeping a record of how well they are doing. This information is needed not only by the individual who is providing the service but also by others in the organisation. Senior management or anyone involved in staff training, for instance, can obtain invaluable facts from the staff who have day-to-day contact with the customers.

Session 12: How can we measure how successful we are at meeting our customers' expectations?

The aim of this session is to enable your staff to identify appropriate ways in which they can measure their success (or failure) in achieving the customer service standards they have already set.

One way of sorting out suitable measures might be to encourage your staff to think of incidents where they believe they succeeded in giving customers what they wanted. By asking the question: 'What are the indicators which make you believe you (or your colleagues) satisfied or failed to satisfy that customer?' you will probably come up with a suitable basis for a *measure*. For instance, an answer such as 'I am led to believe that I (and my colleagues) satisfied that customer because she asked me to thank the chef' could be classified as 'compliments from customers'. An answer such as 'I believe I satisfied that customer because she smiled' or I don't think I satisfied that customer because she did not leave a tip' could be classified as 'customers' facial expressions or gestures' and 'customers' actions'. These can then be totalled over a certain period to arrive at a measure.

Another question you might put to your staff to help them find suitable measures is: 'Does the way in which you provided this service fit in with the aims of the establishment, and how can you tell?'

Particularly useful measures are those which are the easiest to quantify, for instance:

- time taken — a reduction in the time it takes to serve the customer's order, for example
- number of times — how often a certain dish is ordered, or the number of letters of complaint, for example.

For each of the customer service standards you have identified, list two examples of measures which are easily quantifiable. For instance they can be counted in time taken *or* number of times.

CUSTOMER SERVICE STANDARD	***EASILY QUANTIFIABLE MEASURES***

In planning Session 12 you might like to make notes below on some of the following points:

- *how you will encourage your staff to use their own experience to find suitable measures*
- *how you will enable the group to judge how* quantifiable *a measure is*
- *how you will encourage them to think of ways in which levels of success can be* recorded *(written down), not only for their own use, but for the use of other people in the organisation*
- *you might consider getting members of your staff to report back to the group on how they used a selected method of measuring their own success in meeting customer expectations.*

NOW RUN SESSION 12.

Keep the flipchart sheet with the measures selected by your staff and transfer the relevant details to Assignment 1 of Quality control.

The space below is for any notes you may wish to make.

13. COMMUNICATING YOUR FINDINGS WITH OTHERS IN THE ORGANISATION

Your staff are performing what could be called a pilot survey of customer care in the organisation. For this to be a useful exercise, staff outside the group need to be informed of your findings. This is one of the main reasons why your group needs to keep accurate written records of their level of success in satisfying their customers. With these findings, others within the organisation can act upon the information, ensuring that as many people as possible understand how they can give the customers what they want.

Your group has agreed on:

- the main customer service standards
- what action needs to be taken to provide these service standards
- who is responsible for providing these services
- the means of measuring how appropriate these standards are in satisfying the customer
- the means of measuring the level of success in satisfying customers of the staff providing the service.

It remains for you to agree on how this information should be communicated, when, and to whom.

Session 13: How can we communicate our findings most effectively to other staff?

The aim of this session is to enable the group to identify:

- ways in which the customer service standards they have selected, and the chosen means of measuring and recording levels of success in satisfying their customers, can best be put across to other people in the organisation who need to know
- who within the organisation needs the information
- precisely what this information should consist of.

In preparation for Session 13 you might wish to use the space below. For instance, if you asked the group to find out the reaction from other staff to the measures chosen, you may wish to consider how you could best deal with the feedback information. What if other staff were negative or critical in their response? How will you help members of your group who are unable to deal with this? How can you and your staff learn from this response when deciding on ways of communicating information on customer care in the future?

List below the names and job titles of the people (and departments if necessary) who need to be informed about your group's chosen means of measuring levels of success in satisfying the key customer expectations. (In many cases it may be sufficient to mention the names of supervisors or managers who can then inform those they are responsible for.)

NAME	JOB TITLE	DEPARTMENT

Describe, in general terms, ways in which you think your selected customer service standards and means of measuring success (and how they have been recorded) could be communicated effectively to the staff you listed on the previous page. Where appropriate indicate how often these means of communication should occur.

Here are some suggestions for ways in which your chosen measures could be communicated to other staff:

- informal discussions
- meetings
- workshops (using role play)
- training programmes
- illustrated literature (manuals, pamphlets, display notices)
- videos.

How frequently do you think these occasions should arise will depend on the circumstances.

NOW RUN SESSION 13.

Keep the flipchart sheet and transfer the required details to Assignment 2 of Quality Control. To complete the assignment, which is in two parts, record the results of measuring the customer service standards you identified in Assignment 1, and state what you need to do to communicate the results effectively on a long-term basis.

Below is space for any notes you may wish to make.

14. HOW SUCCESSFUL YOU HAVE BEEN IN MEETING CUSTOMER EXPECTATIONS

Making sure you give the customers what they want is a never ending process. But you and your group should be in a position now to review how successful you have been in meeting the key customer expectations which you identified earlier.

The ultimate purpose of the review is to find out where action needs to be taken to improve the service provided. In the on-going process of improving service to the customer, standards which have proved successful can then be built upon, and standards which have been less successful can be altered.

Session 14: How successful have we been in meeting our key customer expectations so far?

The aim of this session is to enable your group to:

- evaluate the level of success of each of the selected service standards in satisfying the key customer expectations.

You may wish to use the space overleaf to plan Session 14 for instance:

- how you can best remind staff of the measures and ways of recording these (decided during Session 13 — look back on your notes and at Assignment 1 of *Quality control*)
- would it help the group to use a point system, say from 1 to 5, in assessing the *degree* or *level* of success of a particular service standard, and thus the urgency of action needed?
- how can you record the overall conclusions you come to on how successful you have been in satisfying the key customer expectations so far?
- at this stage do you want to consider specific action the group should take to improve standards where necessary?

NOW RUN SESSION 14.

Keep the notes and flipchart sheets from this session, and complete the first part of Assignment 3 of Quality control.

Are there any comments you wish to make below?

15. HOW YOU AND YOUR GROUP HAVE CHANGED AND DEVELOPED

As the weeks have gone by you will probably have noticed gradual changes within the group, for instance, in how members relate to each other. You may also have noticed how some members have developed as individuals. Perhaps some members said very little at the beginning of the project, and now they are contributing more. Or perhaps someone else has learnt to listen to the rest of you at last. Hopefully there have also been changes in the group's attitude to customers and their work, with the result that service has improved.

Inevitably acting as the group's facilitator over several months will have brought changes within yourself as well — overall changes, and also more specific changes in your attitude towards the customer and your work. If you are aware of these developments within yourself, you — as a manager involved in this project — are more likely to be able to help your group, and ultimately your organisation, to achieve higher and higher standards of service.

Changes you and the group may have noticed in yourselves and each other include:

- better teamwork
- ability to recognise strong points in others
- better understanding of people
- ability to see another's point of view
- stronger commitment to work
- better enjoyment of work
- increased tolerance
- commitment to higher standards of service.

Describe briefly below what you have gained personally from the project, and how your attitude to your customers and/or your work has developed.

Session 15: How have we changed and developed — individually and as a group?

The aim of this session is to:

- discover what you and your staff have learnt about yourselves, each other, and about your customers
- identify how you and your staff can use this knowledge and personal development to improve customer service in the future.

You may experience an initial reluctance within the group to discuss matters such as personal growth and group dynamics. It may help to remind your staff that the purpose of the exercise is to *improve customer service* and that anything which is discussed should relate to this matter, rather than personal matters for their own sake. In this way you will hopefully be able to keep the discussion on a positive note — with everyone motivated by the same goal.

In preparing for Session 15 you may also find it useful to note on the opposite page the most effective way you can encourage your staff to:

- explore what they can do to continue growing in strength as a group and as individuals
- identify ways in which staff motivation and job satisfaction (which lead to higher standards of customer care!) can be increased throughout the organisation.

Note briefly below changes you have noticed as a result of your staff's involvement in the customer care project:

- *at work in general*
- *within your staff group in particular.*

NOW RUN SESSION 15.

The space below is for notes, comments and reminders you may wish to make.

16. COMMUNICATION BETWEEN YOU, THE GROUP, AND SENIOR MANAGEMENT

You and your group should by now be spreading the word about customer service standards to colleagues, supervisors and heads of department. And hopefully, as a result, improvements to service are already beginning to filter through the organisation. However some of the ideas you and the group have to improve standards probably cannot be acted upon until you receive formal approval from senior management. This will be the case particularly if your recommendations would cost the organisation money, or would require major changes in the way departments are run, affecting a large number of staff.

As the person running the group it is part of your job to act as the link between your staff and the organisation's senior decision makers. The way you decide to do this will influence the way your bosses look upon the project. And don't forget your staff are relying on you to put across their case. Imagine how dispirited they could become if their work came to nothing through lack of management support.

Because you are coming to the end of your initial round of customer care research, you may also need to plan your first major presentation to senior decision makers.

Look back at Assignments 2 and 3 of Customer service standards, *and note the recommended customer service standards and operational specifications which need the approval of senior management before any action can be taken. Then make preliminary notes below on how you could present your case most effectively to senior managers to persuade them of the wisdom of taking action. Try to see things from their point of view (for instance, 'How much will it cost, and will we see a return for our money?'), and remember the importance to management of the effect each action you recommend will have on the organisation.*

Session 16: Are we satisfied with the support we are getting from senior management so far?

The aim of this session is to enable the group to find the most effective methods of communicating with senior managers in order to get its recommendations on customer service implemented.

You have probably already set up communications systems between the group and senior managers. Now is the time for you and your group to see if they are working, or if changes are needed. You may find it helpful to ask yourselves:

- Are we satisfied with the level of support from senior management?
- How can we lift barriers such as fear and prejudice?
- How can we solve other problems in communication?
- What can we do if senior management say no?
- When and how often should meetings take place?
- Who should be present?
- What needs to be discussed?
- What issues have priority?

Be prepared that your own role as mediator between the group and senior management could come under scrutiny. Make sure that you are putting across the information the group want you to, by ending each session with a summary of what you and your staff have agreed you should do and say.

Note below how satisfied you are with the support you are getting from senior management on this project so far. Are there any particular problems, and if so, how do you think these could be overcome? Do you need to adjust your own approach in any way?

Remind yourself of the conclusions you and your staff came to in the review of your success so far in satisfying the customer (see Session 14), and note below the general aspects where you consider the project to date has been worthwhile. How do you see your own role developing, now you are coming to the end of the first round of customer care management.

NOW RUN SESSION 16.

Then complete Part 2 of Assignment 3 of Quality control *on the implications for you of the results of your staff's review on how successful they have been in satisfying the customer. (The results are, after all, one way of judging the success of the entire project so far.)*

17. AND SO TO YOUR SECOND GROUP OF CUSTOMERS

Now you and your group have looked in some detail at how you can provide your first choice of customer types with what they want, it is time to continue the process with another group of customers. You can do this by showing the spidergram produced in Session 1, and agreeing with your staff another suitable group of customers. Then follow all the sessions through using this customer group.

You will probably find that the process is much faster this time round because you are all more used to working as a team. At the same time you will need to be even more thorough in questioning your conclusions — because the ones you reached first time round may no longer be relevant, or at least not relevant to the second type of customers. For instance do not accept that the key customer expectations you identified are necessarily the most important ones now.

You may notice, now you are several months into the project, that you have to deal with a new type of attitude in your staff, as *A Question of Service* explains:

> The initial flush of enthusiasm for a project is sometimes difficult to maintain when the once-new ideas and activities become routine, or when the pressures of getting on with a job jostle for time, energy, innovation and money. It is not easy to maintain the necessary momentum, but it is possible.
>
> You and your staff need to keep asking yourselves:
>
> - What do our customers want?
> - How do we know?
> - What do we need to do?
> - How are we doing?
> - How shall we continue?

You also need to ensure that the organisation continues to take action in the light of what staff discover about customer wants and needs.

In theory, group members should propose ways in which to try out and check the success of the customer service their organisation provides. In practice, you may need to suggest and help organise activities to keep the good work going.

Variety, bursts of specific activity and regular discussion about what is happening are crucial to avoid the gradual death of commitment!

Here are some suggestions to keep up the momentum:

- Contact with customers specifically aimed at finding out what they want.
- Regular staff meetings with service as the main focus.
- The chance for all new recruits to spend a brief period as the organisation's customer (at the organisation's expense and without the new recruit being identified to staff) to find out what it can be like to be a customer there.
- The chance for existing staff to be a customer of the organisation either at their own workplace or, where possible, at another of the organisation's sites.
- Specific times set aside to consider ways of resolving conflicts between the wishes of different groups of customers and organisational restraints.
- Regular meetings with the organisation's decision-makers to present and discuss staff ideas for improving customer service.
- Special arrangements to ensure that behind-the-scenes staff can continue to play a full part in the provision of customer service.
- Sharing existing customer service standards with new staff, colleagues whose first language is not English, staff in other departments or at different sites. Staff are rarely involved in such activities: it is likely they will rise to new responsibility and working partnerships.
- A monthly award of honour — the winner to be chosen by staff themselves, or, in appropriate cases, by customers — to the staff member who has done most towards customer service.
- A periodic re-drawing of a spidergram of who customers are. Groups should beware of their own assumptions when categorising customers.
- Special tasks to examine suitable customer service for new or one-off circumstances (temporary closure of a stately home's toilets for repair; new legislation affecting the supervision of children at sports and leisure facilities; a change in opening hours), random or recurring events (snow; local transport strike; motorway repairs; staff shortages) and unusual or emergency events (a power cut; presentation of a prestigious national award; a bomb scare; customer violence; supplies delay).
- An invitation to customers to let staff know their views of the service offered.
- Invitations to the press to write about the organisation's efforts.

Session 17: How are we going to maintain momentum?

The aim of this session is to:

- select a second group of customers
- identify ways in which you and your staff can ensure enthusiasm does not wane.

Choose two or three of the activities suggested on the opposite page which you think would be appropriate for your staff to try. Explain briefly how each activity could best be organised to keep up the momentum of the project.

NOW RUN SESSION 17.

Write up Assignment 3 of Quality control, *and send your completed assignment cards to your tutor as usual.*

You may wish to use the space below to prepare a checklist to help you in running the second round of the project or perhaps to summarise the notes and reminders of previous sessions.

CUSTOMER CARE MANAGEMENT

SUMMARY OF SESSIONS

The customer perspective

1. Who are our customers?
2. The service journey
3. What do our customers expect at each stage of the journey?
4. What do our customers find important?
5. Who is responsible for giving customers what they want?
6. What should we do to find out what our customers really want?
7. How can we make sure of asking the right questions?
8. What is most important to our group of customers?

Customer service standards

9. How can we resolve conflicts of interest and lift constraints which prevent us satisfying our customers?
10. What service standards are needed to satisfy the key expectations of our customers?
11. What must we do to ensure that customer service standards are reached?

Quality control

12. How can we measure how successful we are at meeting our customers' expectations?
13. How can we communicate our findings most effectively to other staff?
14. How successful have we been in meeting our key customer expectations so far?
15. How have we changed and developed — individually and as a group?
16. Are we satisfied with the support we are getting from senior management so far?
17. How are we going to maintain momentum?

You may wish to use this space to plan when your discussion sessions with staff will take place.

SESSION & TOPIC	PAGES	DATE	VENUE
Customer perspective			
1. Who are our customers?	6, 10		
2. The service journey	13, 19		
3. What do our customers expect at each stage of the journey?	24, 30		
4. What do our customers find important?	35, 40		
5. Who is responsible for giving customers what they want?	45, 47		
6. What should we do to find out what our customers really want?	52, 56		
7. How can we make sure of asking the right questions?	63, 66		
8. What is most important to our group of customers?	71, 72		
Service standards			
9. How can we resolve conflicts of interest and lift constraints which prevent us satisfying our customers?	78, 82		
10. What service standards are needed to satisfy the key expectations of our customers?	85, 88		
11. What must we do to ensure that customer service standards are reached?	91, 95		
Quality control			
12. How can we measure how successful we are at meeting our customers' expectations?	100, 102		
13. How can we communicate our findings most effectively to other staff?	106, 107		
14. How successful have we been in meeting our key customer expectations so far?	111		
15. How have we changed and developed — individually and as a group?	114, 116		
16. Are we satisfied with the support we are getting from senior management so far?	119, 121		
17. How are we going to maintain momentum?	125, 127		

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